

Tax Resolution Intake Checklist

BOULANGER CPA

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Use this checklist to prepare for your tax resolution consultation. Please gather the following:

- ID and Social Security Card
- Last 2–3 years of tax returns
- IRS or FTB notices
- Pay stubs or income docs
- Bank statements
- Mortgage, rent, utility, medical, and other expense records

CALL FOR A COMPLIMENTARY TAX CONSULTATION – YOU HAVE OPTIONS!